

# STRATEGIC PLANNING CHECKLIST



## ✓ Planning Process

- ✓ ☒ General description of process implementation included in plan process documentation
- ☐ Consultant used
- ☒ If so, identify: \_\_\_\_\_
- ✓ ☒ Department/agency explanation of how duplication of program operations will be avoided included in plan process documentation
- ✓ ☒ Incorporated statewide strategic initiatives
- ✓ ☒ Incorporated organization internal workforce plans and information technology plans

## ✓ Analysis Tools Used

- ✓ ☒ SWOT analysis
- ☐ Cost/benefit analysis
- ✓ ☒ Financial audit(s)
- ☐ Performance audit(s)
- ✓ ☒ Program evaluation(s)
- ✓ ☒ Benchmarking for best management practices
- ☐ Benchmarking for best measurement practices
- ☐ Stakeholder or customer surveys
- ☐ Undersecretary management report (Act 160 Report) used
- ☐ Other analysis or evaluation tools used
- ☐ If so, identify: \_\_\_\_\_

Attach analysis projects, reports, studies, evaluations, and other analysis tools.

## ✓ Stakeholders (Customers, Compliers, Expectation Groups, Others) identified

- ☐ Involved in planning process
- ✓ ☒ Discussion of stakeholders included in plan process documentation

## ✓ Authorization for goals

- ✓ ☒ Authorization exists
- ☐ Authorization needed
- ✓ ☒ Authorization included in plan process documentation

## ✓ External Operating Environment

- ✓ ☒ Factors identified and assessed
- ✓ ☒ Description of how external factors may affect plan included in plan process documentation

## ✓ Formulation of Objectives

- ✓ ☒ Variables (target group; program & policy variables; and external variables) assessed
- ✓ ☒ Objectives are SMART

## ✓ Building Strategies

- ✓ ☒ Organizational capacity analyzed
- ✓ ☒ Needed organizational structural or procedural changes identified
- ☐ Resource needs identified
- ✓ ☒ Strategies developed to implement needed changes or address resource needs
- ✓ ☒ Action plans developed; timelines confirmed; and responsibilities assigned

## ✓ Building in Accountability

- ✓ ☒ Balanced sets of performance indicators developed for each objective
- ✓ ☒ Documentation Sheets completed for each performance indicator
- ✓ ☒ Internal accountability process or system implemented to measure progress
- ✓ ☒ Data preservation and maintenance plan developed and implemented

## ✓ Fiscal Impact of Plan

- ✓ ☒ Impact on operating budget
- ☐ Impact on capital outlay budget
- ☐ Means of finance identified for budget change
- ☐ Return on investment determined to be favorable